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Turkey

Oilseeds and Products

Sunflowerseed and products update

2000

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Report Highlights:

The hottest summer in fifty years adversely effected Turkish sunflowerseed production which is now projected about 575,000MT. The GOT has announced the MY2000 Coop buying price for sunflowers at TL165,000 per kg. and agreed to pay a bonus of US\$0.05 per kg., like last year. Lack of domestic sunflowerseed and high import duties on sunflowerseed oil resulted in a fifty percent decrease in MY1999 sunflowerseed oil exports to 55,000MT.

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Unscheduled Report

Ankara [TU1], TU

Executive Summary

The hottest summer in fifty years has adversely affected sunflowerseed production in Turkey. Lack of timely rains and extreme heat caused domestic sunflowerseed yields to decline drastically. Industry observers are now estimating the MY2000 crop at about 575,000MT, twenty three percent less than our earlier estimates. The oil content of domestic sunflowerseed is also reported to be about 39 percent compared to a normal 42 percent.

On August 14, the GOT announced that the Coop buying price for sunflowerseed was TL165,000 per kilogram, a 27 percent increase over the 1999 base prices of 130,000TL (TL640,000 - US\$1). The increase is lower than inflation, in accordance with the GOT's commitment to the IMF to lower inflation and reduce above world market producer prices. The government is also committed to pay a US\$0.05 per kilogram bonus to farmers, as it did last year.

Imported seed dependent Turkish crushers are under pressure from both FSU countries and Turkish government policies. The availability of sunflowerseed from Ukraine and Russia was reduced after they issued export taxes of 23 and 10 percent respectively on sunseed exports in order to support increased utilization of their domestic crushing capacities. Also, in an attempt to eliminate Trakya Birlik's 40,000MT sun oil stocks, the GOT stopped issuing the temporary import permits for sunflowerseed which were previously being issued for domestic processing and re-export purposes, in order to force processors to purchase high priced Trakya Birlik stocks. Both measures are reported to be causing a loss of foreign markets. MY1999 sunflowerseed oil exports are expected to decline to 55,000MT from their usual annual level of 100,000MT. To prevent a further decline of exports and domestic consumption, local crushers are trying to convince the Ministry of Industry to lift the import ban on sunflowerseed oil for domestic processing. Industry members argue that the present situation is favoring other imported oils like corn oil and soy oil whose import tax is only 12 percent, compared to 37.6 percent for crude sunflowerseed oil.

A lack of domestic supplies triggered imports of sunflowerseed meal. During the first nine months of MY1999 (Sept.99-May 2000) sunflowerseed meal imports increased to 175,180MT.

The attached trade matrices include data for the first three quarters of MY1999, September- May.

PSD Table						
Country	Turkey					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		09/1998		09/1999		09/2000
Area Planted	0	0	0	0	0	0
Area Harvested	520	520	540	540	540	540
Beginning Stocks	40	30	30	30	30	30
Production	650	650	800	800	700	575
MY Imports	595	665	520	420	490	400
MY Imp. from U.S.	10	9	20	10	20	20
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	1285	1345	1350	1250	1220	1005
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	1208	1295	1270	1210	1150	967
Food Use Dom. Consump.	7	10	10	5	10	5
Feed,Seed,Waste Dm.Cn.	40	10	40	5	40	3
TOTAL Dom. Consumption	1255	1315	1320	1220	1200	975
Ending Stocks	30	30	30	30	20	30
TOTAL DISTRIBUTION	1285	1345	1350	1250	1220	1005
Calendar Year Imports	440	629	0	471	0	400
Calendar Yr Imp. U.S.	0	21	0	9	0	8
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Oilseed, Sunflowerseed		
Time period	MY99 Sept-May	Units:	
Imports for:			1
U.S.	2310	U.S.	
Others		Others	
Russia	238877		
Bulgaria	41880		
Romania	19162		
Ukraine	16277		
Moldavia	8192		
Germany	2567		
Argentina	2048		
Georgia	1940		
Denmark	1763		
Holland	960		
Total for Others	333666		0
Others not Listed			
Grand Total	335976		0

PSD Table						
Country	Turkey					
Commodity	Meal, Sunflowerseed				(1000 MT)(PERCENT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		09/1998		09/1999		09/2000
Crush	1208	1295	1270	1210	1150	967
Extr. Rate, 999.9999	0.380795	0.382239	0.387402	0.380165	0.385217	0.379524
Beginning Stocks	0	0	0	0	0	30
Production	460	495	492	460	443	367
MY Imports	90	92	50	200	50	270
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	550	587	542	660	493	667
MY Exports	5	0	5	0	5	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consum.	0	0	0	0	0	0
Feed Waste Dom. Consum	545	587	537	630	488	637
TOTAL Dom. Consumption	545	587	537	630	488	637
Ending Stocks	0	0	0	30	0	30
TOTAL DISTRIBUTION	550	587	542	660	493	667
Calendar Year Imports	0	31	0	133	0	200
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Meal, Sunflowerseed		
Time period	MY99 Sept-May	Units:	Metric tons
Imports for:			1
U.S.		U.S.	
Others		Others	
Ukraine	51291		
Bulgaria	39877		
Russia	49784		
Romania	31397		
Byelorussia	2472		
Syria	780		
Total for Others	175601		0
Others not Listed			
Grand Total	175601		0

PSD Table						
Country	Turkey					
Commodity	Oil, Sunflowerseed				(1000 MT)(PERCENT)	

	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		9/1998		9/1999		9/2000
Crush	1208	1295	1270	1210	1150	967
Extr. Rate, 999.9999	0.423841	0.420849	0.42126	0.421488	0.421739	0.403309
Beginning Stocks	70	70	60	60	60	50
Production	512	545	535	510	485	390
MY Imports	140	131	160	100	190	135
MY Imp. from U.S.	10	11	15	10	0	15
MY Imp. from the EC	10	10	10	5	10	10
TOTAL SUPPLY	722	746	755	670	735	575
MY Exports	85	114	100	55	100	70
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	15	10	15	10	15	15
Food Use Dom. Consum.	542	535	560	530	550	425
Feed Waste Dom. Consum	20	27	20	25	20	15
TOTAL Dom. Consumption	577	572	595	565	585	455
Ending Stocks	60	60	60	50	50	50
TOTAL DISTRIBUTION	722	746	755	670	735	575
Calendar Year Imports	280	157	0	135	0	150
Calendar Yr Imp. U.S.	0	5	0	10	0	15
Calendar Year Exports	65	137	0	70	0	90
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Oil, Sunflowerseed		
Time period	MY99 Sept-May	Units:	Metric tons
Imports for:			1
U.S.		U.S.	
Others		Others	
Argentina	34948		
Russia	11658		
Ukraine	10930		
Romania	7960		
Bulgaria	3351		
Switzerland	1997		
France	1965		
Antalya Free Zone	310		
Total for Others	73119		0
Others not Listed			
Grand Total	73119		0

Export Trade Matrix			
Country	Turkey		
Commodity	Oil, Sunflowerseed		
Time period	MY99 Sept-May	Units:	Metric tons
Exports for:			1
U.S.		U.S.	
Others		Others	
Syria	12537		
Georgia	3182		
Baltic Countries	3493		
Israel	2214		
Iran	2290		
N.Cyprus	1668		
Morocco	1050		
Lebanon	1409		
Uzbekistan	922		
Greece	2583		
Total for Others	31348		0
Others not Listed	7646		
Grand Total	38994		0